

RONALD M. FINKELSTEIN, CPA*

PARTNER ► TAX & BUSINESS SERVICES

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Ronald M. Finkelstein is a tax partner in the Firm's Long Island office and national co-leader of the Trusts and Estates Practice group. His extensive experience as an attorney and certified public accountant helps clients address their estate planning needs and make informed decisions for the future of their families and their businesses. As a trusted advisor to fiduciaries and estate and trust beneficiaries, Mr. Finkelstein handles all aspects of estate and trust administration.

A recognized authority on trust and estate issues, Mr. Finkelstein frequently lectures on topics relating to fiduciary income tax, trusts and estates matters and individual retirement account planning. Additionally, he has authored several articles for various industry and regional publications and has been quoted in the New York Daily News, Newsday, Practical Accountant and Long Island Business News on taxation issues.

Prior to joining the Firm in 2001, Mr. Finkelstein spent 14 years as an attorney counseling individuals, business owners and fiduciaries with trust and estate matters.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
New York State Society of Certified Public Accountants (NYSSCPA),
Nassau County Chapter, President
Nassau County Chapter Taxation Committee, Past Co-Chair
New York State Bar Association (NYSBA),
Estate and Trust Administration Committee, Vice Chair

Articles & Presentations

Even Fiduciaries Have to Pay the Piper: A How-To Guide to the Income
Taxation of Trusts and Estates, Herald National Bank, 2010
Tax Aspects of Divorce, NYSSCPA Nassau County Chapter, 2009
1041 Review & Updates, National Conference of CPA Practitioners, 2009

Awards & Honors

Fifty Around 50, Long Island Business News, 2010

PRACTICE FOCUS

- Estate Planning
- Business Succession Planning
- Estate & Trust Administration
- Estate, Gift & Fiduciary Income
- Tax Returns
- Retirement Planning

INDUSTRY FOCUS

- High-Net-Worth Individuals & Families
- Closely-Held Business Owners
- Executors & Trustees
- Estate & Trust Beneficiaries

EDUCATION

- Juris Doctor
New York Law School
- Bachelor of Science, Accounting
New York University

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ACCOUNTANTS ▲ ADVISORS

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